DOCUMENT RESUME

ED 269 034 IR 051 511

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TITLE Database Search Service Policies and Procedures.
INSTITUTION Indiana State Univ., Terre Haute. Library.
PUB DATE Feb 86
NOTE 100p.
PUB TYPE Guides - General (050) --
Legal/Legislative/Regulatory Materials (090)

EDRS PRICE MF01/PC04 Plus Postage.
DESCRIPTORS Academic Libraries; *Administrative Policy; *Databases; Guidelines; Higher Education; Library Administration; Library Planning; *Online Searching; *Online Systems; Position Papers; Records (Forms); *Reference Services
IDENTIFIERS *Indiana State University; *Library Procedures

ABSTRACT

This document details 28 policies and 37 procedures of the online searching service at the Indiana State University (ISU), Cunningham Memorial Library. Sixteen forms used in various aspects of the process are also included. The policies include but are not limited to the following: (1) the Database Search Service organization; (2) Database Search Service searches; (3) statistics on database searching; (4) evaluation of searches; (5) promotion of database searching; (6) current awareness for searches; (7) searcher meetings; (8) interviews with search requestors; (9) on-demand searching; (10) search patron's presence during search; (11) clientele; (12) choosing a vendor for a search; (13) charging; (14) instruction and demonstrations; (15) policy on ISU faculty grants for searching; (16) policy on ISU grants for graduate student searching; and (17) policy on use of the IBM-PC in reference. Procedures are concerned with but not limited to: searchers and staff; vendors; recordkeeping; statistics; evaluations; vendor bills; budget planning; training; search aids; vendor and database newsletters; publicity; requesting and assigning searches; using the database room and terminals; charging for database searches; distributing database search prints; use of the Indiana Information Retrieval System (INDIRS) by patrons; various aspects of SEARCH HELPER; and rules and procedures for using the IBM PC for searching. Forms include search logs, billing slips, computer search requests, search evaluations, and search statistics. (THC)

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INDIANA STATE UNIVERSITY
CUNNINGHAM MEMORIAL LIBRARY
DATABASE SEARCH SERVICE
POLICIES AND PROCEDURES

Pat Ensor
Coordinator, Database Searching
February, 1986

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DATABASE SEARCH SERVICE

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DATABASE SEARCH SERVICE
ORGANIZATION

The Database Search Service is a component of the Reference Department and, therefore, of Public Services. The Database Search Service is administered by the Coordinator of Database Searching, hereafter referred to as the Coordinator, who reports to the Head of Reference. (See Coordinator of Database Searching: Position Description.) The Database Search Service may also be staffed by one or more Support Staff, who report to the Coordinator, to provide clerical assistance.

The Database Search Service also is given time by other librarians in the Reference Department and other areas of the library who conduct database searches as needed and maintain their knowledge of database searching in support of this function. This amount of time varies, depending on the demand for computer searches and the searcher's own need for knowledge. In matters relating to database searching, these librarians report to and consult with the Coordinator.

INDIANA STATE UNIVERSITY

Cunningham Memorial Library

Position Description

Department: Reference Date: January 1983

Position Title: Coordinator of Database Searching Position Code:

POSITION SUMMARY:

Has primary responsibility for the coordination and development of all phases of the Database Searching Program including searching, training, marketing, accounting, and selecting materials and equipment. Establishes a close working relationship with experienced searchers and other librarians who will be participating in database searching. Participates in other Reference Department responsibilities including Reference Desk services and may assume bibliographic instruction and collection development responsibilities.

SUPERVISION RECEIVED:

Reports directly to the Head of the Reference Department

SUPERVISION EXERCISED:

Supervises any support staff or student assistants assigned to the Database area.

MINIMAL ACCEPTABLE QUALIFICATIONS:

An ALA accredited Master's Degree. Two years of extensive experience in database searching, preferably in an academic library. Reference Desk experience. Demonstrated ability to communicate effectively with faculty, staff, and students.

ADDITIONAL DESIRABLE QUALIFICATIONS:

Second subject Master's Degree and database searching experience desirable, particularly in education, business, and technology. Prefer experience with DIALOG, BRS, and/or SDC.

TYPICAL DUTIES AND RESPONSIBILITIES:

1. Bears general overall responsibility for all phases of data base searching.

2. Coordinates the activities of database searchers; for example, arranges training programs for them and trains them directly as necessary and feasible.

3. Serves as official ISU Library contact and liaison for matters, such as INCOLSA, vendors' activity, etc.

4. Serves as official contact with vendors, (e.g., DIALOG) in regard to policy, procedures, training arrangements, and any problem areas.

5. Personally specializes in searches in areas of education and business, and must maintain ability to search in other areas as back-up.

6. Responsible for the selection of equipment and library materials or search aids.

7. Develops and/or edits ISU publicity brochures, demonstrations, posters, forms, logs, etc.

8. Responsible for the evaluation of the service.

9. Writes the quarterly and annual reports.

10. Works regular schedule at the Reference Desk.

SEARCHERS

The number of searchers may vary over time depending on the demand for searches and the needs of the individual searchers. Only librarians will be trained to do searches. A librarian may request training in database searching or the Coordinator may express a need for a new searcher. In either case, the Coordinator and the portential searcher will consult with the Head of Reference, who will make the decisions involved. In general, the expense of training in time and money should not be incurred if the searcher is not prepared to search in the area in which s/he is most needed.

A searcher may request a temporary or permanent discontinuing of his/her searching. A temporary "respite" will be allowed by the Coordinator if the searcher requests it due to involvement in one or more short-term, intensive, time-consuming projects, or due to other reasons at the decision of the Coordinator. If problems arise in this area, the matter will be referred to the Head of Reference. If a searcher wishes for some reason to stop searching permanently, s/he cannot do so without receiving permission from the Head of Reference, after consultation with him/her and with the Coordinator. This should not be requested or allowed except under unusual circumstances, such as a greatly changed job description and assignment, or a physical disability which makes searching very difficult.

Each searcher will search at least one and preferrably two vendors. The choice of vendor to concentrate on will be based on the subject areas the searcher is searching in and the relative charges of the vendors, and is to be made in consultation with the Coordinator.

The subject areas each searcher will search will be determined by the Coordinator and the searcher in consultation. The decision will be based on the searcher's interest and/or expertise in a subject and on the need for a searcher in a particular area. Any problems in this area will be referred

to the Head of Reference.

The load of searching will be divided based on what subject areas are requested most so that some searchers may get more searches. The Coordinator should have the heaviest search load. The assignment of searches should be made in accordance with first, the subject area and vendor required in a search, and, second, with regard to keeping each person's (not including the Coordinator's) share of the search load equitable and giving each searcher enough searches to maintain proficiency.

INDIRS

The Indiana Information Retrieval System is available free of charge to all CML patrons who wish to use it. The patron does the searching because the system is user friendly.

STATISTICS ON DATABASE SEARCHING

Statistics shall be calculated and recorded by the Coordinator on all non-INDIRS database searching. The areas in which statistical counts will be kept will be determined by the Coordinator in accordance with the following considerations:

1) The primary governing principle will be fiscal accountability. Records should always be kept of how much is being taken in payment for searches and how much is being paid out to vendors for them. Any other counts which will aid in this should also be kept.

2) When the faculty grant is in effect, statistics should be kept on amounts expended from it.

3) Records of each searcher's search load should also be kept, in addition to records of the total search load.

4) Any other statistics the Coordinator thinks appropriate or is asked to provide by his/her supervisor may be kept.

Statistics should be calculated and recorded on a regular basis, to be agreed upon by the Coordinator and the Head of Reference.

EVALUATION OF SEARCHES

Evaluation of the process and results of each individual database search is desirable in order to determine how to improve the service as a whole. Each patron should be asked to evaluate his/her search for its utility and in any other areas deemed appropriate by the searchers as a whole. This evaluation should be in written form.

All evaluations received should be kept on file by the Coordinator. Each searcher will receive copies of evaluations of his/her searches. Composite statistics on evaluations will be calculated and recorded on a regular basis to be agreed on by the Coordinator and the Head of Reference.

REPORTING ON DATABASE SEARCHING

The Coordinator shall report in writing quarterly and annually to the Head of Reference on activity in the Database Search Service. The annual report will be done at the end of the fiscal year.

The quarterly reports will be based on statistics kept regularly on database searching and evaluations of it. In addition, the Coordinator will report on promotional efforts, searcher training, and innovations implemented in the search service. The annual report will be based on the quarterly reports.

PROMOTION OF DATABASE SEARCHING

It is desirable that the database search service be promoted to increase its use, as long as due consideration is given to the limits of the resources available for searching - that is, the searcher's time and the equipment being used. If resources are taxed at a certain time, the Coordinator may decide that promotion is inappropriate. Promotion should be a constant concern, however, with special efforts being made as the need arises. The Coordinator will determine the most appropriate methods of promotion to reach the desired audience, upon consultation with the Head of Reference.

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A housekeeping fund for database searching will be defined as funds allocated to cover minor expenses for online time incurred in the operation of the database searching service and not charged to a patron. The reasons that there would be no patron charged include the following:

1) Administration - some operations necessary for optimum functioning of the database searching service must be done while online with a database vendor. These would include getting current rate listings, looking at current news, testing for vendor malfunctions, sending and receiving electronic messages, and testing equipment, among others. This use of the fund should normally be made only by the Coordinator or her designee.

2) Telecommunication, Vendor, and Equipment Malfunctions - malfunctions in terminals, modems, and telecommunication lines occasionally occur which make searching impossible; the patron should not be charged for a session online where a search is not completed. In the case of vendor malfunction, the library will contact the vendor to receive credit.

3) Searcher Error - even the most seasoned searcher makes some errors occasionally in the course of database searching. Searcher errors that result in the patron not receiving the set of prints expected by him/her at the end of the search should not be charged to the patron, but to the housekeeping fund. After the searcher involved consults with the Coordinator, the search will be reexecuted, with the possibility of printing records online to minimize delay. Searchers will never be held personally financially responsible for honest errors. High instance of error may indicate a need for retraining and more searching to maintain proficiency, but will

never be considered negatively by the Coordinator. Housekeeping fund information regarding searcher error amounts for a particular searcher will be known only by the Coordinator and the individual searcher, to be released at the discretion of that searcher.

4) Demonstrations - small, inexpensive demonstrations of database searching can often be done on Dialog's free file for each month, usually involving a free half-hour online on a particular file. Telecommunication and online printing costs are not included, however, and may be charged to the housekeeping fund. A searcher should consult with the Coordinator on use of the fund for this purpose. Other inexpensive ($4.00 or less) demonstrations may be done with the permission of the Coordinator. Expensive, full-scale demonstrations will require separate funding.

5) Training - occasionally a searcher may feel that the use of the new and/or unfamiliar database or technique s/he is required to search or use necessitates a small amount of training and practicing online. Such costs should not normally exceed $5.00 per searcher request and will be charged to the housekeeping fund. The searcher must receive the permission of the Coordinator to do such practice, and should be able to demostrate the need for it to the Coordinator. More intensive training, as for first learning to search or learning a new vendor language, should be funded separately.

6) Search Aid - in some searching, the choice of database to use, the function of a particular command, or the correct terminology to enter for a search may not be clear. In these cases, online cross-indexes or thesauri separate from the database used to obtain search results may accessed. These aids to searching should be used with discretion and the charge should not exceed $4.00 per search.

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Other unforeseen uses for the housekeeping fund may arise on an occasional basis; these may be approved by the Coordinator in consultation with the Head of Reference. If a usage of the fund not mentioned above occurs often, it should be incorporated in this policy.

CURRENT AWARENESS

FOR SEARCHERS

All searchers will be expected to keep current their knowledge of search techniques, newly available databases, and any other areas needed to maintain searching proficiency. Each searcher need only keep up with the vendor that s/he searches. The Coordinator will be expected to maintain an extensive current knowledge of all the vendors the library uses, in order to serve as a consultant and a backup searcher. The Coordinator should also stay informed on the entire field of database searching.

Current awareness should be maintained by reading the newsletters of appropriate vendors and database producers, and professional journals which include coverage of database searching, and by attending workshops and conferences which present material on database searching.

SEARCHER MEETINGS

The Coordinator should call meetings of searchers at least twice a semester, and may call more at his/her discretion. It is not necessary to meet in the summer. Any searcher may request that a meeting be held. Meetings may cover any aspect of computer searching and are intended to facilitate communication in a way that no other method can. The Coordinator sets the agenda, but any searcher can propose items for it or bring them up as other business, as long as the topic is related to database searching.

CONTACTING SEARCH REQUESTORS

When a person requests a database search in some way so that s/he does not speak directly to the searcher who is going to do the search, the searcher will normally attempt to contact the requestor by telephone to set up an interview. The searcher's contact attempts will be considered sufficient if s/he has tried to phone the requestor at least three times and received no answer, or if s/he has left a message at the requestor's number. These calls should be made at varied times and in accordance with any available hours listed by the requestor. If the searcher has been unable to contact the requestor after making the attempts specified above, s/he may return the request to the Coordinator. A record of the dates and times of attempted contacts should be kept by the searcher.

INTERVIEWS

Both the literature and the practice of database searching have shown the necessity of an in-person interview with the requestor of a computer search. The lack of an interview, the conducting of it on the phone or in writing, or with a "surrogate" for the requestor who is not a co-researcher, has a very high chance of resulting in an unsatisfactory search. Only in exceptional circumstances would any of these methods be acceptable. A face-to-face interview with the person(s) for whom the search is being conducted will be part of the normal search process in this library.

As with any policy, there may be exceptions to this one; the Coordinator will be the one to make them, after s/he has investigated the circumstances at the request of a searcher or a requestor, and found reason for an exception. Possible exceptions might be requestors who are working in the behalf of someone who is in an area where database searching is unavailable or requestors whose circumstances are extraordinary and do not allow them to come to the library within the time that the search is needed. The normal press of classes, work, etc., is <u>not</u> acceptable as an excuse for a change in practice. If the requestor is really interested in having a search done, s/he will make time for it.

It often happens that two or more people are working on a project for which they need a search done. As long as the searcher is satisfied that they are co-researchers who are working equally on the project (<u>not</u>, for example, a graduate student who is working for a faculty member, if that student is not participating fully in the research in question), any one or more of the co-researchers may carry out the interview. In this case, all of the co-researchers need not be present, nor does the original requestor need to be present. If there is a problem in determining this type of question, it should be referred to the Coordinator.

In any of the above cases, or in any others where exceptions to the

usual interview are found to be needed, the following is the order of preference for methods of contact: telephone contact with the requestor, personal contact with an informed "surrogate", telephone contact with the "surrogate", written contact with the requestor, written contact with the "surrogate". The last two methods are particularly deplorable because of the impossibility of interaction, and strong consideration should be given to refusing the search if these are the only possibilities. If any of these methods are used, the requestor and any "surrogate" should be informed that the library is not responsible for any lack in quality of the search results due to lack of, or problems in, communication. If the library decides not to make an exception to the need for a direct interview with the requestor, and the requestor will not come for the interview, s/he will be told that we will be unable to conduct the search, although we would be glad to refer them to another search service.

Once the searcher has contacted the requestor, the searcher will make a good-faith effort to set the interview appointment as soon as the requestor wants it. If the searcher and the requestor cannot agree on an appointment within the time frame of the requestor, the searcher should consult with the Coordinator so that the search can be reassigned. The searcher is never obliged to change his/her scheduled hours to accommodate a requestor nor must s/he take an interview while on the reference desk. As noted above, if a requestor really wants a search, and the searcher has attempted to accommodate him/her the within regular hours and been unable to, the requestor will have to change his/her schedule - i.e., get off work, etc.

The content and style of the "normal" interview will vary depending on the searcher and the nature of the topic being searched. The searcher will generally aim to obtain the most complete picture possible of the needs of the requestor in order to conduct the most satisfactory and efficient search s/he can.

ON-DEMAND SEARCHING

The provision of searches on a walk-in, non-appointment basis will only be made available at the convenience of the searchers. It will not be considered a usual service, but will be done only if it is requested and a searcher volunteers to do an immediate interview and search. This is necessary since all searchers are liable to have other appointments and other demands on their time.

SEARCH PATRON'S PRESENCE DURING SEARCH

The decision as to whether to allow a patron who wishes to sit in while his/her search is being done may do so is up to the searcher involved. This practice of having the patron present during the search is encouraged, but not mandated. Searchers are particularly encouraged to allow faculty members to be present, especially if they request it, but if the searcher feels strongly against this and a faculty member requests it, the searcher may consult with the Coordinator to work out a solution.

INFORMING REQUESTOR OF ALTERNATIVES TO SEARCHING

At some appropriate time during the search process, usually during the interview, but sometimes at the initial contact, the searcher must insure that the requestor is aware of the alternatives to having a database search on his/her topic. The searcher should acquaint the requestor with the printed sources available on his/her topic if s/he is unaware of them. The requestor should also be informed when there is a print equivalent easily available of a database being considered for his/her search. The requestor may not have known of the existence of certain printed sources and may decide not to have a search done, or may be influenced in his/her choice of which database to have searched. After insuring that the requestor has been informed, however, the searcher will then do the search on any database the requestor chooses, whether or not there is a print equivalent, since some of the advantages of searching are its speed and labor-saving aspect, and this may well be what the patron wants.

CLIENTELE

Database Searching is available to Indiana State University students, faculty, and staff, and to non-ISU users. ISU users will be given priority over non-ISU users in the provision of search services, and Vigo County non-ISU users will be given priority over non-Vigo County users. Non-ISU users will be charged for searches on a different basis than ISU users. (See "Charging"). ISU users include ISU-Evansville students, faculty, and staff, as long as that campus is part of ISU.

Rose-Hulman Institute of Technology and St. Mary of the Woods College people are considered to be non-ISU users and are charged accordingly.

PRESENTATION OF IDENTIFICATION

If a searcher has any reason to suspect that a search requestor is not what s/he appears to be - is not part of our campus community or is not actually a faculty member, for example - the searcher should ask for appropriate identification. If suspicions arise that a requestor is not a faculty member when the requestor is not present, the searcher should call the requestor's department to check. Presentation of identification is not mandatory. If problems arise in this area, they should be referred to the Coordinator.

AUTHORIZATION FOR SEARCH

The conducting of a database search must be authorized by the signing of the "Database Search Authorization and Workform" (Form 2) by the search requestor, indicating agreement with the terms specified on the form. This should normally be done before the search is executed, although exceptions may be made, on consultation with the Coordinator.

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CHOOSING A VENDOR FOR A SEARCH

The choice of a vendor to use for a search is based first on the search topic(s) and next on the charge per connect hour on each vendor. If the most appropriate database for a particular topic is available only on one vendor, that vendor should be chosen. If a database is on more than one vendor, the cheapest vendor should be chosen, unless there is good reason to believe that that version of the database is inferior to the other. If a searcher finds that a topic requires searching a vendor s/he is not familiar with, s/he should consult with the Coordinator.

If a topic is to be searched on more than one database, at least one but not all of which are only on one vendor, the searcher is encouraged still to use the cheapest vendor for the database(s) that are on both vendors, even though this results in searching on two vendors for the same search. If the searcher feels, however that his seriously impairs the quality of the search, s/he may do the entire search on one vendor.

CHARGING

CAMPUS USERS (students, faculty, administration, staff of ISU)

There will be two flat fees for typical database searches.

1) Databases with connect charges of $40 per hour or less (usually government sponsored)	$8.00, plus charges for offline prints
2) Databases with connect charges greater than $40 per hour (usually commercial)	$18.00, plus charges for offline prints

A search that requires searching multiple files in a database (for example, Medline) will be charged as one search. Otherwise, a flat fee will be charged for each database when accessing multiple databases during a search. If more than one category 2 ($18.00) database is accessed in a search, the charge for the first one will be $18.00, then all other category 2 databases used for the search will cost $8.00 each.

The charge for offline prints will be: .15 per print for citation only
.20 per print with abstract.
This does not apply to prints which cost more than .50 each. The patron will be assessed full(recovery) costs for these.

One form of database search will be an exception to the above: the ready reference search which cannot be done on SEARCH HELPER. A ready reference search is one which:

1) aims at producing one or two pieces of information, not a bibliography;
2) results in 5 or fewer items retrieved;
3) takes no more than about 5 minutes online.

Examples would be finding an address, completing a citation, or finding a statistic. These searches must be identified by the searcher and patron in advance as ready reference searches and will cost the patron $5.00, no matter what database is used.

If a library staff member needs a ready reference search to help perform his or her job duties, the Coordinator may at his or her discretion use Housekeeping funds to provide the search, as long as the amounts fall within the quantity of funds available. Any searcher who is requested by a library staff member to perform such a search should check first with the Coordinator.

COMMUNITY USERS (corporations, individuals, etc.)

Community users will be charged the full cost of their search, plus a 50% service fee.

COMPLAINTS

If a search patron has a complaint to make about his/her database search, referrals should be made in the following order:

1) First, to the searcher who conducted the search.

2) Next, to the Coordinator.

3) Next, to the Head of Reference.

4) Next, to the Director of Public Services.

5) Next, to the Dean of the Library.

6) Next, to the Office of the Vice President for Academic Affairs.

Policy 22 - 12/85

ADVISING AND CONSULTING

As a service to persons who are interested in doing their own online searching, librarians with appropriate knowledge are encouraged to provide advice and information about online searching when it is requested. If the searcher approached does not desire to or cannot help the information requestor, s/he should be referred to the Coordinator. It should be made clear that any information given is not the view of the library itself, and that neither the librarian or the library is responsible for anyone's problems with doing their own online searching. If an information requestor desires extensive aid - teaching of search techniques, "trouble-shooting", etc. - s/he should be referred to the Coordinator and the Head of Reference. If the library cannot accomodate this person, s/he will be referred to another source of aid.

As a community and campus service, the Coordinator or any interested searcher(s) are encouraged as time and resources permit, to prepare aids for those who would like to do their own searching - bibliographies or contact lists, for example. The librarian should consult with the Coordinator and the Head of Reference about such projects.

INSTRUCTION AND DEMONSTRATIONS

As part of the attempt to promote understanding and use of database searching, searchers are encouraged to give instructional classes and, when possible, demonstrations on database searching. These may be done at the request of faculty or on the initiative of the librarian, with the permission of the Coordinator. Presently, the intent of such instruction should be to make the recipients aware of the nature and possibilities of online searching. A future goal to aim at would be instruction in the techniques of searching.

ISU Faculty Policy-Grants for Searching

When the University Research Committee grants money to subsidize ISU faculty searching, certain policies apply.

Each faculty member shall be eligible for a fixed amount of money for free searching in each fiscal year that the grant is funded, charged based on the library's usual charges to patrons. (Currently it amounts to $36 worth of free searching). This free searching is allowed on a first-come/first serve basis and is allowed until the funds are used up or the fiscal year ends. No faculty member may receive more than the amount of grant currently assigned to him/her, no matter how much money is left in the fund.

The faculty member who is making use of his grant funds for searching must be present at the search interview. The faculty member cannot "sign away" his grant funding to anyone else, except to another faculty member after 2/3 of the fiscal year has elapsed. At the same time, the librarian is not obliged to determine if the faculty member is searching a topic for someone else, as long as the faculty member is present at the interview.

Policy 25 - 12/85

ISU GRANT FOR GRAGUATE STUDENT
SEARCHING - POLICY

When money is granted by ISU to subsidize graduate student searching, the following policies apply.

Each graduate student shall be eligible for a fixed amount of money for free searching in each fiscal year that the grant is funded, charges based on the library's usual charges to patrons. (Currently it amounts to $36 worth of free searching). This free searching is allowed on a first-come/first-served basis and is allowed until the funds are used up or the fiscal year ends. No graduate student may receive more than the amount of grant currently assigned to him/her, no matter how much money is left in the fund.

The graduate student who is making use of his/her grant funds for searching must be present at the search interview. The graduate student cannot "sign away" his grant funding to anyone else. At the same time, the librarian is not obliged to determine if the graduate student is searching a topic for someone else, as long as the graduate student is present at the interview.

If the searcher has any reason to doubt that the requestor is an ISU graduate student, the graduate student must show identification indicating that s/he is a graduate student at ISU. If this is unavailable for some reason, the searcher may call the student's department for confirmation. One of these forms of verification must be obtained.

During times when the University is not in session, graduate students are still eligible for these free searches if they are enrolled as graduate students during the last semester and will be in the next or if they are only summer graduate students. If the searcher has reason to doubt this, s/he may check with student's department.

Policy 26 - 12/85

SEARCH HELPER

During the initial period of use of SEARCH HELPER, it will be kept at the Reference Desk, and its use will usually be limited to library employees. All reference desk librarians will be trained in using it, whether they make extensive later use of it or not. By the end of the initial period all reference desk librarians will be expected to know how to use the system in appropriate situations, just as one would any other reference tool.

In the initial period, the decision to use SEARCH HELPER will be made by the librarian; it need only be used when the librarian thinks it appropriate for a question, not just because a patron requests it. The system can be used on behalf of any patron, whether or not he or she is with ISU in any way. The librarian may also use the system for his or her own professional needs.

The librarian may not have time to use SEARCH HELPER when the desk is busy. If the librarian decides its use is needed, he or she may ask the patron to return at a later time, if the patron wants to get the answer. If the patron refuses, SEARCH HELPER will not be used. If he or she agrees, the librarian will take his or her name, and run the search when time allows. Results will be kept under the patron's name in the Database Searching Room along with database search printouts. The librarian should not mention SEARCH HELPER to the patron unless the librarian is prepared to do the search him- or herself either immediately or sometime later in the day.

No fee will be charged during the initial period, although one may be charged later when the system is made publicly available.

The librarian who executes a search must record the requested information about it in the SEARCH HELPER log.

Policy 27 - 12/85

USE OF THE IBM PC
IN REFERENCE - POLICY

The IBM PC in the Reference Department may be used for any functions carried out by the department. Members of other departments who wish to use a microcomputer should be referred to the Faculty Word Processing Center.

The priority for use in the department is as follows: first priority goes to doing database searches, second priority would be word processing, database management (when available), and any other such functions, and last would be personal use for professional concerns, to be done on nights and weekends.

Use of the PC should be scheduled in advance on the calendar next to the computer. When necessary, database searches may "bump" other users, but efforts will be made to work within the schedule.

Day-to-day responsibility for the IBM PC will belong to the Coordinator of Database Searching.

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Policy 28 - 12/85

SEARCHERS AND STAFF

As of December 1985, the searchers and their subject and vendor specialties are as follows:

Pat Ensor, Coordinator - any area but pure sciences; BRS and Dialog

Kathy Gaul, reference librarian - social sciences, business, and education; BRS and Dialog

T.K. Huang, reference librarian - ERIC and Psycinfo; BRS

Allen Keathley, reference librarian - humanities and other as needed; BRS

Gene Norman, Head, Reference Department - ERIC, Psycinfo, and ABI/INFORM; BRS

Susan Thompson, Head, Science Library - pure sciences; Dialog

Judy Tribble, Interlibrary Loan librarian - medicine, education, social sciences; BRS

Jack Lyle, Government Documents librarian - INDIRS

Other potential searchers include Rolland McGiverin, Head of Teaching Materials, who has received training in BRS.

Database Searching has a quarter-time clerical position, currently filled by Roger Syester, public services floater, who also works in Library Instruction & Orientation. The Coordinator supervises this position during the quarter of each day he or she works in Database Searching, although it is also responsible to the Director of Public Services. This position carries out any clerical duties related to Database Searching and the Coordinator's other functions.

VENDORS

As of December 1985, ISU Libraries have access to the following database search services:

BRS - Through a group contract with INCOLSA (see next Procedure) at a vendor royalty of $17 per hour; most regular searching done on this vendor since it is cheaper than Dialog, unless BRS does not have the needed database;

Dialog - through an agreement directly with Dialog, no discount and no group contract since there is not a high enough volume of searching on the service, though it is a necessary vendor;

Information Access Company's SEARCH HELPER - through a contract with IAC at a charge of $1750 per package of 700 searches;

BRS After Dark - through an agreement directly with BRS at a charge of $75 per year, plus a minimum of $12 per month charge; intended for use in instruction and demonstrations;

INDIRS - through an agreement with its producers at Indiana University; bill paying handled by Director of Public Services.

BRKTHRU ?

INCOLSA

INCOLSA, or the Indiana Cooperative Library Services Authority, is very important in database searching in Indiana; ISU Library is a member of it. Based in Indianapolis, it employs an Information Retrieval specialist (currently Becki Whitaker) who trains people in searching, arranges workshops on searching, serves as a consultant, and issues a newsletter on searching. INCOLSA is the only non-library school source of search training and vendor workshops in Indiana. It also attempts to set up group contacts with database vendors; ISU Library uses BRS through INCOLSA, which charges a 5% fee for amounts billed to the library from BRS.

The Coordinator is the INCOLSA IR Contact for ISU and will receive the monthly IR newsletter. He or she should photocopy the newsletter and circulate it to searchers and other interested staff since it contains a calendar of INCOLSA and vendor workshops.

RECORDKEEPING

The decision as to what records are kept is up to the Coordinator as long as records involving money - what the library is charged and what it charges to patrons - are retained. Currently the following items are kept:

Database Search Authorization and Workforms

Terminal sheets

Searcher logs

Faculty grant logs and authorization forms

Graduate grant logs and authorization forms

Invoices

Intramural vouchers

Vendor bills

Evaluations

Correspondence and memos

All these are retained permanently and kept in the Database Search Room.

STATISTICS

Currently, statistics are kept on the following elements of database searching:

Total number of searches

Number of searches done by each searcher

Status of users - how many of each type

Departments of users from ISU - how many from each

Total actual cost of searches to library

Total charges to patrons

Number of faculty grant searches

Amount of faculty grant used

Number of graduate grant searches

Amount of graduate grant used

Number of searches on each major vendor

Average cost of searches on each vendor

These statistics are compiled monthly and reported to the Head of the Reference Department and the Director of Public Services. In addition, each month the Coordinator reports privately to each searcher how much his or her searches cost, and how much was charged to the patron for them.

An additional statistic is compiled and reported quarterly: number of times each database is searched.

EVALUATIONS

An evaluation form (form 14) is attached to every set of database search results. When filled-in evaluation forms are returned, the Coordinator determines who did the search, and writes the date the evaluation was received on the form. If the search was not done by the Coordinator, he or she has a copy of the evaluation made and gives it to the appropriate searcher. The original is kept on file in the database room. Statistics on evaluations are compiled and reported quarterly and annually.

VENDOR BILLS

When bills are received from vendors, the coordinator reviews them along with the appropriate search logs to verify that the charges are roughly correct. They are not expected to balance with the search logs but should match approximately. The Coordinator initials the first sheet of the bill, then has a copy made of the entire bill. The original is given to the Accounting Technician in the Administrative Offices of the library. The copy is kept on file in the Database Room.

BUDGET PLANNING

In the first few months of each year, budget requests must be made for the upcoming fiscal year. Money must be requested for a housekeeping fund. In addition, any other special items - new equipment, printing money, etc. - should be requested through this process. This does not meant that no changes can be made during the year, but items we anticipate needing should be asked for. Budget planning forms are available from the Head of Reference and should be filled out according to the instructions given on the form, then returned to the Head of Reference.

PROCEDURES FOR THE CREATION AND USE
OF THE HOUSEKEEPING FUND

1) To create the fund - The Coordinator will determine an amount to be requested for the housekeeping fund for a fiscal year and request it as a part of the annual Planning process, currently conducted in January of each year.

2) To charge to the fund:

   a. A searcher should first consult with and/or receive oral permission from the Coordinator to charge to the housekeeping fund, in accordance with the policy guidelines.

   b. After the online session(s) to be charged to the housekeeping fund is completed, the resulting terminal sheets with the filled out blue slip attached should be left in the Coordinator's mailbox. The slip should give the actual computer charges incurred, as indicated on the terminal sheets. On the blue slip, the searcher should enter his/her name, the date of the search, and the reason the search is being charged to the housekeeping fund. The total amount for the search should be entered in "Estimated Total." The "database(s) searched" section should also be filled in.

   c. The Coordinator will file these records in the Database Searching Room. At the end of each month, the Coordinator will total the charges made on the housekeeping fund and keep a record of this for bookkeeping purposes. The Coordinator will then note and take proper action on vendor malfunctions, if this was not done at the time the problem occurred. The Coordinator

will also mentally note any excessive searcher error(s) and take appropriate action, in accordance with policy guidelines.

d. As vendor bills arrive, the Coordinator will use records of housekeeping fund charges to aid in verifying charges listed on the bills.

TRAINING

When a searcher is first being trained or someone who already searches is learning a new system, if INCOLSA offers an appropriate workshop, the person should be sent to it, if funds are available. INCOLSA system workshops are usually inexpensive, so this should not be a problem, but a travel request must be submitted as usual. If the library is getting a system new to all the searchers, at least the Coordinator should attend a workshop on it, then he or she can train other searchers.

If INCOLSA does not offer training in the required area, the Coordinator must develop and implement training for the person(s) involved. There are not set procedures for this.

The Coordinator should bring searching workshop opportunities to the attention of other searchers as appropriate to their interest. If a searcher indicated an interest in attending a workshop, the searcher should submit his or her own travel request, but the Coordinator should see that the person gets registered for the workshop. Searchers are encouraged by the library to attend workshops which will directly aid them in searching, as funds permit.

TRAVEL AND LEAVE

Travel request forms (pink) and leave request forms (green) are kept in the filing cabinet next to the student assistant's desk behind the reference desk. Whenever anyone wants to attend a meeting, conference, or workshop, he or she should fill out a travel form in duplicate as indicated on the form. This should be filled out even if one is only requesting time off with no money to be spent. University cars are usually available; to request one, enter "Requesting University Car" under transportation. If others are attending the same event, requests for cars should be coordinated. Registration fees and transportation costs (if a University car is not available) are eligible for reimbursement; if the event is more than one day, meals and hotel money is possible. One should ask for as much money as is needed; the administration will then decide how much will be allowed.

To request vacation or other leave, one submits the green form in duplicate filled out as indicated on the form. Travel and leave forms are given to the Head of Reference, who passes them on to the library administration if he or she approves. Within a few weeks, the requestor should receive a form indicating approval or disapproval, money allowed, if any, and information on a University car, if requested.

Travel and leave should be requested as far in advance as possible to increase the chances of getting a University car, if requested, and to allow for Reference Desk schedule making. If the schedule in question is already made, the travel or leave requestor must arrange any changes.

Be sure to make reservations for workshops, etc., as far in advance as possible, as long as money isn't actually spent until permission has been received. Many workshops fill up quickly, and one can usually cancel, if permission is refused.

SEARCH AIDS

The library has subscriptions to documentation for BRS and Dialog. Blue Sheets and Aid Pages come to the Coordinator with the vendor newsletters. Blue Sheets have their own binder, as do Aid Pages, but Aid Pages must be copied when matching chapters arrive and the copy filed with the chapter, since BRS doesn't do this. Chapters are received by Acquisitions, then sent to Database Searching. They should be filed in the appropriate binder.

Thesauri and other search aids may be acquired as needed using fund 7209. The amount of money in the fund will be revealed by Acquisitions near the first of each fiscal year. The Coordinator should keep track of what is encumbered. The science searcher also orders from this account. Items are ordered through Acquisitions using purchase request forms which should indicate that the item is for Database Searching and should not be cataloged. Free non-serial items may be requested by letter (form 13) or phone directly by the Coordinator.

Search aids should be kept and usually used in the Database Room. Library patrons may use search aids, but only in the Database Room or under the close supervision of a searcher. We do not go out of our way to let the public know we have these; if the need by the public for them becomes great, separate copies should be acquired.

VENDOR NEWSLETTERS

Currently we receive two copies of Dialog's Chronolog and one copy of BRS Bulletin each month. One copy of the Chronolog, with its attachments should be sent immediately to the science searcher. The other copy should be read by the Coordinator, who makes sure that all appropriate attachments are filed. The Coordinator also makes written changes on bluesheets, etc., as specified in Chronolog and orders free materials as listed to aid in computer searching. The newsletter is circulated to Kathy Gaul and to Library Instruction & Orientation. It is filed in the appropriate binder in the Database room.

All of the above applies to the BRS Bulletin, except that a copy of it needs to be circulated to BRS searchers.

DATABASE NEWSLETTERS

Database producers often issue free newsletters about their databases. Database Searching tries to get on the list to receive as many of these as possible. The existence of these newsletters is usually announced in the vendor newsletters, and the Coordinator should write for all of the ones listed, particularly since this will get us on mailing lists for other things.

These newsletters are kept in a file box in the Database Room, most recent ones at the front. Any searcher may look at them, but they are not usually circulated. The Coordinator should also weed them out periodically.

CIRCULATION OF PROFESSIONAL PERIODICALS

The Coordinator should review all of the periodicals the library takes which usually cover online searching. These currently include Online, Online Review, Database, Information Today, Advanced Technology/Libraries, Library Hi Tech News, RQ, and Reference Services Review. He or she may, of course, review any other professional journals desired. To get on the reviewing list for these items, notify the Reference Department secretary.

ARTICLES ON SEARCHING

Since it is sometimes difficult to retrieve desired articles again after one has reviewed a professional periodical, the Coordinator should have a copy made of any item which may be of lasting interest to searchers. These should be stored in the marked file box in the Database Room. Any searcher may refer to these items, but should make sure items used are replaced in the box.

FREE TIME ON DIALOG

Traditionally, Dialog has offered some amount of free time on one of its databases each month. We have two passwords; each one gets the free time. The Coordinator should consult with the Dialog searchers each month to see how the time should be used. Preference goes to the searcher(s) who normally search the subjects covered by the free database. Every effort should be made to take advantage of the free time.

This free time may be used for a patron's database search when appropriate. The Coordinator will decide when the patron will be charged for this as usual - if the database is being tried as an "extra" only because it's free, generally the patron shouldn't be charged, but if the database would have been searched anyway whether or not it was free, the patron should be charged as usual. When no patron is being charged, the telecommunication costs for the free searching should come from the housekeeping fund.

PUBLICITY

Avenues for on-campus publicity include direct mailings, announcements in library instruction classes, brochures, announcements in the Academic Notes, and announcements or articles in the Statesman. The Coordinator may take the first four options at his or her discretion, but must consult with the Head of Reference and the Director of Public Services before having any contact with the Statesman. This need to consult also applies to off campus publicity, which is usually given a low priority.

Direct mailings have traditionally been done only to faculty and only in targeted subject areas. Targeting has been done based on announcing a useful new database, reminding those who have used the faculty grant before that it is available again, and trying to increase usage in low - use departments for which appropriate databases are available. These mailings have usually been very successful. A mailing to all faculty members has not been tried recently, because it would hit many departments where searching is not appropriate or is already done quite a bit. Choice of methods in this area, however, is left up to the Coordinator.

The Coordinator should include information on database searching in his or her library instruction classes when appropriate and should encourage others to do the same. (The exception to this is SEARCH HELPER; as long as it's free to patrons, it should not be overpromoted.) The Coordinator should be prepared to do annotated lists of databases appropriate for a subject area whenever requested for classes or bibliographies.

The Coordinator prepares most brochures for database searching; currently these are based on broad subject areas. The Head of the

Science Library prepares the brochures for his or her subject areas, although the appearance and content should be in line with the other brochures. Brochures should be printed on campus since this is cheapest. Funds must be requested for this from the Director of Public Services, preferably far in advance (see BUDGET PLANNING). Brochures should be updated every couple of years or so. They should be disseminated through library instruction, new faculty orientation, the library information stand on first floor, and any other ways the Coordinator can think of.

Announcements in the Academic Notes must usually be placed by the Wednesday of the week before the desired issue date, which is always a Monday. They are sent to the Office of the Vice President of Academic Affairs. They should be brief and to the point.

Statesman and non - campus contacts will be arranged through the Administrative Office of the library, although the Coordinator may suggest them. Care should be taken as far as accuracy of communication, and the Coordinator should take into account a possible long lead time between the contact and any resulting publicity.

DEMONSTRATIONS

Database searching demonstrations may be done with the portable terminals anywhere with a phone line, although visibility to a large group is poor. The computer projector in Room D-55 is most suitable for demonstrations to groups. The IBM PC in the Database Searching Room may be used for small groups, when necessary.

Several avenues for funding exist for demonstrations. Very inexpensive ones can be funded through the housekeeping fund. The Dialog free time can be used for a demonstration, with the telecommunication charges paid by the housekeeping fund. The vendors will sometimes fund demonstrations; they should be contacted by phone or letter and given the date of the demonstration, the database involved, and the number of attendees expected. The Coordinator may also request special funding for a demonstration from the Director of Public Services.

Searchers may receive requests for demonstrations directly or through Library instruction & Orientation. A direct request that involves the use of a library classroom should be coordinated with LI & O.

QUESTIONS AND COMPLAINTS ABOUT SEARCHES

Questions about searches received at the Reference Desk may be answered by the librarian on duty at the time, if the question is one of citation interpretation or something similar. Questions or complaints relating to how a search was done or why certain results were retrieved can only be answered by the searcher who did the search. If this searcher is away for a lengthy period of time, the Coordinator should attempt to deal with the matter.

If it seems necessary to redo a search, the searcher who originally did it should consult with the Coordinator. If the Coordinator agrees, the searcher will redo the search and it will be charged to the housekeeping fund. Only if the original searcher is away for a lengthy period will the Coordinator redo the search if necessary.

REQUESTING AND ASSIGNING SEARCHES

Patrons may request searches in person or on the telephone. Anyone working at the Reference Desk may take a request for a database search, using a Computer Search Request Form (Form 15). The most important information to take down is the requestor's name, status, and brief search subject, and all information that would help the searcher get in touch with the patron, including available hours and phone numbers. The person who takes the request should also sign the form. If a searcher takes the request and wishes to do the search, he or she may take it and should notify the Coordinator of this.

If the search is not taken by the person who receives it first, the request form should be given to the Coordinator, who will either take it him- or herself or assigned it to an appropriate searcher by writing the searcher's name and the date in the appropriate spot and giving it to the searcher. The Coordinator should keep a written record of which searches are assigned to which searchers. Searches for the head of the Science Library should be referred directly to him or her when possible.

When the search is finished, the request form should be returned to the Coordinator who keeps it for at least a few months.

USING THE DATABASE ROOM AND TERMINALS

To reserve the TI terminal and IBM PC, the user should note on the calendar next to the appropriate machine the time it is being reserved for, his or her name, and, for the IBM PC, the purpose for whcih it is being used - searching, word processing, etc. If the machine desired has not been reserved in advance, it may be used on a first-come, first-served basis, except that for the IBM PC, searching always takes precedence over other uses.

For searching and interviewing, it is preferable that only one searcher conducting either of these activities should be in the room at one time, although one person searching and one interviewing may be present simultaneously if time is pressing and both agree. Other people may be in the room, however, doing other functions while someone is interviewing or searching, as long as they are quiet. The clerical assistant must have access to the room, as must the Coordinator. Other staff would mainly be concerned with getting printouts for patrons. Searchers should never be directly interupted while online. Searches and interviews may be conducted elewhere at the searcher's discretion.

When no one is searching or interviewing in the database room, preparation for searching has first priority, database search service - related work by the Coordinator or clerical assistance is next, and other reference staff work is last.

PROCEDURES FOR ISU FACULTY GRANTS FOR SEARCHING

There are differences in the procedures to be followed when doing searches for faculty on the ISU grant and for faculty searching.

1) Before a search is executed the faculty member must fill out and sign an authorization form for use of the grant.
2) The user search request form should indicate that the searching is being done from the ISU faculty grant.
3) After the search is executed, the search authorization form should be filed alphabetically on the clipboard for the current grant. At the bottom left corner of the page, the amount remaining to be used for that faculty member from the grant should be noted.
4) On the log at the front of the clipboard, the searcher should note the search date, the faculty member's name, the department, the vendor and database used, the amount of the grant expended in the search, the total amount spent so far on grant-funded searches, and the searcher's initials.

ISU GRANT FOR GRADUATE STUDENT
SEARCHING - PROCEDURE

The following exceptions will be made to the normal search procedure when a graduate student is having a "free" search on an ISU library-administered grant.

During the search interview, the student must complete the form for graduate student searches on the grant (form 10).

The student may present identification showing s/he is a graduate student at ISU. (See policy on ISU Grant for Graduate Student Searching.)

After the search, the searcher will record the appropriate information on the graduate grant searching log and attach the above-mentioned form (Form 10) to the log.

PROCEDURES FOR CHARGING FOR DATABASE SEARCHES

If a search is being done using money from a University grant for faculty searching, the following steps should be taken relating to charging.

1) "ISU faculty grant" should be indicated on the computer Search Workform (form 2).

2) The appropriate information should be entered on the clipboard for the current grant. (See "PROCEDURES FOR ISU FACULTY GRANTS FOR SEARCHING").

3) The number of offline prints expected, if any, should be indicated in the top right corner of the Computer Search Workform.

4) The terminal sheets should be attached to the Computer Search Workform and left in the Search in Process file if offline printouts are expected, or in the Searches Completed file if no offline printouts are expected.

5) If the faculty members search cost more than his/her allotted funds, a blue charge slip should be filled out specifying the amount owed by the patron to the library. The Invoicing Process should then be followed. Graduate grant searches should be handled in the same manner.

If a search is being wholly or partially paid for by the patron, or his/her department, the following steps should be taken relating to charging.

1) If the search is being charged to a University department, the Database Search Authorization form (form 3) should be filled out with the date, the department name, the faculty member's name, and the account number to which the search will be charged. The department chair must also sign the form. This should be done before the search is executed, unless permission to do otherwise is received from the Coordinator. This form should be attached to the Computer Search Workform.

2) Whether the patron or a department is paying for the search, when the search is done, the searcher fills out a blue charge slip with the name of the patron, the source of payment, the charges to be made, and the databases used. This slip is attached to the Computer Search Workform and the terminal sheets and placed in the Search in Process file.

3) The assistant to the Coordinator or the Coordinator checks the Search in Process file daily. If a completed search has a blue charge slip and no pink invoice slip attached and is not being charged to a department, the invoicing process is followed. If the search has a blue slip and no intramural voucher copy attached and is being charged to a department, the intramural voucher process is followed.

4) The Intramural Voucher Process - An intramural voucher should be typed up according to the attached sample. A copy of the intramural voucher should be made and attached to the computer Search Workform. A copy of the Database Search Authorization Form should be made and attached to the voucher; these should be sent to the Accounting Technician in the Library Administrative Office to be handled in the appropriate manner. The Computer Search Workform and its attachments should be returned to the Search in Process file if offline printouts are expected, or to the Searches Completed file if no printouts are expected.

5) The Invoicing Process - A 3-part ISU Invoice should be typed up according to the attached sample. The invoice number should be noted on the Computer Search Workform. The white invoice form should be copied. The white invoice form and the copy made should be mailed to the patron in a window envelope. The yellow copy of the invoice should be sent to the Accounting Technician in the Library Administrative Office to be handled in the appropriate manner. The pink copy of the invoice should be attached to the Computer Search Workform, which should be returned to the Search in Process file if offline prints are expected, or put in the Searches Completed file if no printouts are expected.

6) Receipts returned from the Business Office to indicate payment of a database search charge should be attached to the appropriate Computer Search Workform.

PROCEDURE FOR DISTRIBUTING DATABASE SEARCH PRINTS

If prints are taken online at the terminal:

1) The searcher attaches the prints, separated from the rest of the terminal sheets, to the Computer Search Workform, (form 2) and places the form in the Search in Process file.

2) The assistant to the Coordinator or the Coordinator notes the presence of online prints when doing billing, and notifies the patron immediately with a call to him/her or a message left with his/her department (if a faculty member).

3) The online prints are left in the appropriate Search Pickup box in the Database Search Room and distributed in the same way as offline prints (described below).

4) The Computer Search Workform is placed in the Searches Completed File.

If prints are taken offline and received in the mail:

1) When prints arrive, the assistant to the Coordinator or the Coordinator takes the appropriate Computer Search Workform from the Search in Process file.

2) The patron is notified with a call to him/her or a message left with his/her department (if a faculty member). If the patron cannot be contacted after 3 calls, a pickup notice (form 1) should be sent through intercampus mail or first class regular mail.

3) The date the prints were received is noted on the computer Search Workform and the receipt of the correct prints is verified by the Coordinator or assistant initialing by the date of receipt. The Computer Search Workform is then placed in the Searches Completed File.

4) The name of the patron is written on the front sheet of the offline prints and a search evaluation form is attached. The front sheet of the results should be photocopied. The copy should then be stamped "Rec'd by_____Date_____," and attached to the prints. This is then placed under the appropriate letter in the boxes for printouts in the Database Search Room.

5) The librarian who conducted the search is notified that the results are available for viewing, which should be done as soon as possible.

6) The patron may pick up his/her prints at the Reference Desk anytime it is open. Any Reference Desk personnel may distribute searches. The person distributing the prints should obtain the recipient's signature on the copy on the

front sheet of the results in the stamped spot, indicating receipt of the results. The signed sheet should be placed in the boxes for printouts in the Database Search Room. Any patrons with questions about their search results should be referred to (in order of preference): the librarian who conducted the search, any searcher librarian, or any non-searching reference librarian. Any unresolved questions should be referred to the coordinator.

INDIRS

To use the Indiana Information Retrieval System, the CML patron must make an appointment with the Documents Librarian or his designate. The Documents Librarian schedules the terminal on the Database Search log. He arranges for the terminal to be in the Documents area at the time of the appointment.

After being given brief initial instruction by the Documents Librarian or his designate, the patron does the searching. To aid in the searching the patron may use the INDIRS manual.

The Documents Librarian keeps record of the number of appointments made.

SEARCH HELPER - Starting Up

1. Turn on the printer (switch - right side.)
2. Turn on modem (back - left-hand side.)
3. Turn on monitor (top right corner of screen.)
4. Insert SEARCH HELPER disk into disk drive and close disk drive.
5. Turn on computer (back - left-hand side.)
6. SEARCH HELPER screen should appear on monitor. Follow its instructions.

NOTE: Anyone who does a search should make a mark on the sheet attached to the keyboard for this purpose. The Coordinator will keep track of these statistics, change the sheet periodically and keep track of the IAC bills which denote number of searches used. The Coordinator should also start up the system every morning he or she is present. Otherwise the librarian on the Reference Desk should do it.

SEARCH HELPER - Notes and Tips

1. SEARCH HELPER uses a modified form of the Library of Congress Subject Headings for its descriptors.

2. When the program asks you to enter information (a number, your search topic, etc.), press the "return" key after typing your reply.

3. When you have told the program to initiate your search, it will ask you to verify the correctness of the search. After you have done this, the program will take over. Do not enter anything else or press any keys until the program gives you a screen which lists 6 display/print choices.

4. If you make a typing error before you press "return," use the arrow keys on the lower right side of the keyboard to move the cursor back to the error and type over it. if you make an error or change your mind after you've pressed "return," try pressing "return" again. If that doesn't work, you may have to go through the program until it asks you to verify your search, then press "N" instead of "Y." Remember, you can always turn off the computer and start over.

5. When SEARCH HELPER is not being used, turn the dial on the right-hand side of the screen until the screen is dark. This will keep letters from being "burned" onto the monitor because they've been on there too long.

SEARCH HELPER - Advanced Searching Techniques

It is possible in SEARCH HELPER to search in more ways than are specified on the screen--more than just person or subject. The ones that will be most useful are article type, author, and case name. These and other methods of searching are discussed in section 3.4 in the SEARCH HELPER MANUAL.

To search using any of these methods, just say you want to search a subject, then enter the prefix for what you want (for example, AT= for article type), and the specific item your're looking for.

1. Article Type - the most useful forms of this are AT=evaluation and AT=review. For example, for reviews of the movie "Heavenly Bodies," one subject would be "heavenly bodies" and one subject would be "AT=review." For evaluations of microwave ovens, one subject would be "microwave ovens" and one subject would be "AT=evaluation."

2. Author - The person search only retrieves material <u>about</u> people, not <u>by</u> them. Using AU= will get someone as an author. For example, to retrieve articles <u>by</u> Harlan Ellison, enter "AU=Ellison, Harlan" <u>as a subject</u>. For articles <u>about</u> him, enter "Harlan Ellison" as a person.

3. Case Name - This is used in Legal Resources Index and Management Contents. To search this, use CN= as a subject. For example, to search for something on the Bakke case, enter "CN=Bakke?" as a subject.

SEARCH HELPER DESCRIPTION SCREEN --- CHOICE 7

```
IAC MAGAZINE INDEX (tm)
  Cover-to-cover indexing of more than 400 popular magazines
  from the U.S. and Canada, from 1959 through last month.
IAC NATIONAL NEWSPAPER INDEX (tm)
  Cover-to-cover indexing of New York Times, Wall Street Journal,
  and Christian Science Monitor from 1979; Washington Post and
  Los Angeles Times from 1982.
IAC TRADE & INDUSTRY INDEX (tm)
  Comprehensive coverage of more than 300 business and trade
  journals.  Coverage beginning 1981.
IAC LEGAL RESOURCE INDEX (tm)
  Coverage of all major English-language secondary legal
  literature, including more than 750 bar journals and law
  reviews and seven legal newspapers, from 1980.
MANAGEMENT CONTENTS (tm)
  Coverage of more than 500 business and management journals
  since 1977.
IAC NEWSEARCH (tm)
  Daily update of the above databases, including references
  for the last 30 days.
Press any key to return to menu...
```

NOTE TO APPLE USERS: This screen has been abbreviated to accommodate the 40 characters per line restriction.

GENERAL RULES FOR USING SMARTCOM II ON THE IBM PC

1. When using Smartcom II offline, the cursor will usually have a letter under it. If that is the letter you want to enter, just press return. If it isn't what you want, just press the key for the letter or number you'd like to replace it with.

2. Offline, if you've entered something, then change your mind, press the exc key to escape. This will usually offer you a way out.

3. When you're online, Smartcom II displays a status line at the bottom of the screen to show what function keys you can use. This line disappears, though, when you're downloading to disk or running a macro, so here's a copy of it for reference purposes.

Menu: F1 Print: F3 Disk: F4 Macro: F5 Break: F6

4. When I mention F keys or function keys, I'm referring to the set of 10 keys that are marked F1,F2,F3...F10 on the left side of the keyboard.

STARTING UP THE IBM PC FOR SEARCHING

1. Remove the Wordstar disk from the disk box. Insert the disk in the left drive (Drive A), close the drive door, and turn on the computer (red switch on the right side of the computer at the bottom near the back.)

2. Some words will appear on the screen. After a few seconds, "A>" will appear twice. At that point, remove the Wordstar disk and insert the Smartcom II-Working disk in Drive A and close the drive door.

3. Type "scom" and press the return key.

4. After a few seconds, you should receive a menu screen that says "Smartcom II" in the top left corner.

5. Proceed from this point to search, create macros, etc.

CREATING MACROS FOR SEARCHING ON THE IBM PC

1. From the Smartcom II menu, select #2 (edit set).

2. Press the "s" key, then enter the letter of the system and telecommunications line you want to enter your macro on (for example, "P" would indicate BRS on Telenet.)

3. Press the "M" key for macro, then enter a letter for a macro you want to create. I usually use "A" since it is easy to remember.

4. A macro screen will appear. Enter the name of your macro--for example, "smith search"--then press return.

5. Press return again, and the first time-out will remain "0." Type the prompt number for the system you're using ("58"(:) for BRS, "63"(?) for Dialog) and press return. Type the first line of your search, then press return three times. The last word on the macro line should be "yes" and the time-out on the second line should be "10." Type your prompt number, press return, and type the second line of your search. Then press return twice.

6. Type "20" for the time-out, press return, type your prompt number, press return, type your third line, and press return twice. Repeat until you have entered the last line of your search.

7. Remember, it is best not to enter any kind of print or logging off statements in your macro, since you don't know what will happen when you execute it. Just do your initial search and be prepared to interact online once it is through.

8. Press the escape (esc) key, then press return to tell the system to record your macro.

9. Move on to begin your search.

EXECUTING A SEARCH WITH THE IBM PC

1. From the Smartcom II menu, select #1 (begin communication).

2. Press return to tell the computer you wish to "originate" communication.

3. You will be given a directory of possible computer systems and telecommunications networks to use. Enter the letter which represents the one you want.

4. The computer will automatically dial the system you've chosen. If you can't get on with that system, it will tell you; you must end your communication (see below), and try again using a different telecommunication network. (If you will be uploading your search through a macro and the system you planned on using is unavailable for some reason, you will have to reenter your macro on another system before you get back online.)

5. You should get a blank or mostly blank screen. Press the F4 function key, so that everything taking place during the session is saved on disk. You may log on as you usually do, or you may use macros I've already prepared to get the computer to logon automatically. If you want to log on automatically, press the F5 function key, then press the letter for the system and telecommunication network you're using (for example, "P" for BRS on Telenet.)

6. Once you're logged on, you may search as usual, or you may use a macro you've already prepared. To do this, press the F5 function key, then the letter of your macro. Once the macro is through, continue your search as necessary. The system you're using may be working slowly, so some macro statements may get entered before you've received the results of the ones before them. Don't worry! They should still be executed in order, so just wait till execution of the entire macro is finished.

7. There are two things to remember while searching: please try not to enter search statements more than one line long, since the printer can't print them, and realize that once part of your search is off the screen, you can't look at it again while you're online. This means you should write down important sets and results as you go, and/or use the display commands to look back at sets and results. For BRS, use ..D and the set number(s) you want--for example, ..D 1-10. For Dialog, use DS and the set number(s)--for example, DS 1-10.

8. When you finish your search, log off as usual. Until we have a printer in the database room, if you want to do your search paperwork immediately, you'll need to write down the required information as you go, or look back through your file after you're offline. (See SEARCH "TIDYING UP" FUNCTIONS AND GETTING OFF THE IBM PC.) A printout of your search will not be available until I can go elsewhere to print it, at which time I will delete your file.

9. Press the F1 function key to close your disk file. the system will ask you to name the file; give it the name of the patron or an abbreviation of it.

10. Press the F1 function key again to return to the menu.

11. Press the "0" key to "end communication." then press return if you want to stay on Smartcom II to do other things or "Y" if you want to get off.

SEARCH "TIDYING UP" FUNCTIONS AND GETTING OFF THE IBM PC

Viewing or Erasing your Search File

1. From the Smartcom II menu, select #3 (select file command).

2. To view a file, press "D" for display. Enter the desired file name. The file will be displayed page by page, with you pressing any key to continue through it and the F1 function key to stop viewing it.

3. To erase a file, press "E" for erase. Enter the desired file name, then enter "y" to confirm that you want it deleted. You should not normally do this, but you may want to get rid of a file where you were unable to get online.

Deleting a Macro

1. Unless you expect to be using it again, delete your search macro when you're through with it. To do this, select #2 (edit sets) from the menu.

2. Press the "S" key, then enter the appropriate letter for the communication directory entry where your macro is listed.

3. Press the "M" key, then enter the letter for your macro.

4. When you've got the macro screen, press the esc key, then press the "E" key to erase your macro.

Getting Off the IBM PC

1. From the Smartcom II menu, select "0" (end communication/program.)

2. The computer will say "Exit Program? (Y/N):" Press "Y".

3. Remove the disk from Drive A and return it to its envelope and box.

4. Turn off the machine (red switch on right side).

SCIENCE LIBRARY

The Head of the Science Library has a TI terminal and some vendor documentation so that he or she may conduct searches and interviews at the Science Library. He or she takes searches directly without referring them to the Coordinator, and does publicity and instruction in his or her area. He or she should, however, use the same forms used at the Main Library and follow the same policies and, where appropriate, procedures. The Head of the Science Library sends the Database Search Authorization and Workform for a search, graduate or faculty grant forms when appropriate, and photocopies of the terminal sheets to the Coordinator every time he or she does a search. The Coordinator fills out the appropriate forms for charging for the search. The Main Library Search Service takes care of any billing and distributing of prints. At the end of each month, copies of the log sheets for Science Library searches must be sent to the Coordinator.

DATABASE SEARCHING, ext. 2454
Indiana State University Library
Terre Haute, Indiana 47809

Date _____

We have been unable to contact you, and we have received your database search results.

Please pick-up at the Reference Desk at your earliest convenience.

Thank You.

Form 1

BEST COPY AVAILABLE

ISU LIBRARIES DATABASE SEARCH AUTHORIZATION AND WORKFORM

PATRON INFORMATION

Name_____Department or Major_____

Soc. Sec. No._____

Mailing Address_____

Department Phone_____Home or Business Phone_____

Status: _____ISU Faculty _____ISU Grad. Student _____ISU Undergrad.
_____ISU Admin./Staff _____Unaffilliated with ISU

Payment by: Applicant_____ Business_____ ISU Faculty Grant_____
ISU Grad. Grant_____ Dept. Grant_____(Dept. Chair's signature required)

Other Research Grant_____Account No._____

Search Purpose: (Circle one) Research Class Assignment Course Update

Article Book Thesis/Dissertation Other_____

SEARCH INFORMATION: (To be completed in consultation with searcher)

Statement of search topic_____

Languages: English only_____ Other_____
Publication dates: All years available_____ Other_____
Other limitations: (Document type, human or animal, etc.)_____
Government sponsored database(s) $8 ea._____
Commercial database(s) $18 ea._____
Prints: Without abstract ($.15 ea.)_____ With abstract ($.20 ea.)_____
Cost limit (specify maximum)_____

SEARCH AUTHORIZATION: I accept the following conditions:

* I must pay for this computerized literature search according to the library's schedule of charges.
* Costs of the search cannot be cancelled once the search on the terminal has begun.
* There is no guarantee that information of interest will be found, and charges are made even if no prints result.
* Irrelevant citations may result.
* Delivery date of prints cannot be guaranteed.
* Citations retrieved are not necessarily for material available in this library.

_____ _____
SIGNATURE DATE

Form 2

DATABASE SEARCH AUTHORIZATION

TO: Indiana State University Library DATE: _____

FROM: _____
(Department)

_____ is hereby authorized to charge the
(Name of faculty member)
department for a database search. Account # _____.

Signed _____
(Department Chairman)

Form 3

THIS FORM TO BE RETAINED BY THE LIBRARY

BEST COPY AVAILABLE

DATA BASE SEARCH
ISU LIBRARY - REFERENCE DEPARTMENT

TO:_____

_____

_____

_____

Charge to:Applicant____Account No._____

The following bill is for services performed by the Reference Department.

Government Sponsored Data Bases
____@ $8..... $_____
Commercial Data Bases
____@$18..... _____
Offline Prints
____@ $___..... _____

ESTIMATED TOTAL..... $_____

The data base(s) searched include:

_____

_____

(complete in duplicate)

Form 4

BEST COPY AVAILABLE

INVOICE

INDIANA STATE UNIVERSITY

BUSINESS OFFICE

TERRE HAUTE, INDIANA 47809

Business Office Use _____

Date _____

Department _____

Dept. Invoice Number _____

TO:

BUSINESS OFFICE

FOR BUSINESS OFFICE USE ONLY	
Debit	Credit

DESCRIPTION	AMOUNT

APPROVED DIRECTOR OF ACTIVITY	AUDITED	APPROVED CONTROLLER

FORM B 50

Approved by State Board of Accounts
for Indiana State University—1977

INDIANA STATE UNIVERSITY

INTRAMURAL VOUCHER

FOR SERVICES AND GOODS FURNISHED

DEPARTMENT _____ BY _____

BLDG. _____ ROOM _____ DATE BILLED _____

QUANTITY	ITEMS	UNIT PRICE	TOTAL COST

ACCOUNT	DEBIT	✓

ACCOUNT	CREDIT	✓

APPROVED

VOUCHER DATE

HEAD OF DEPARTMENT

BUSINESS OFFICE

INTRAMURAL VOUCHER NO.

ORIGINAL (White) For Business Office DUPLICATE (Blue) for Dept. Billed TRIPLICATE (Yellow) For Supplying Dept.

DATE	NAME	DEPT.	VENDOR	DATABASE	AMOUNT	TOTAL	SEARCH

DATE	NAME	DEPT.	VENDOR	DATABASE	AMOUNT	TOTAL	SEARCH

ONLINE DATABASE SERVICE

Indiana State University funds have been allocated for database search services in support of faculty research. Faculty members are eligible on a first-come/first-served basis for up to $36.00 of free on-line database search service during the period of July 1, 1985 to June 30, 1986. Any charges above the $36.00 limit will be paid by the faculty member.

NAME: _____

DEPARTMENT: _____ DATE: _____

I intend to use the information from my search for:

_____ Making a decision to apply for a grant

_____ Writing an article or book

_____ Providing an update in my field

_____ Other; please explain _____

_____

_____

_____

I understand that I am responsible for any charges over the $36.00 allowed per search.

_____

Signature

Total Grant Expended

Form 9

ONLINE DATABASE SERVICE

Indiana State University funds have been allocated for database search services in support of graduate students' research. Graduate students are eligible on a first-come/first-served basis for up to $36.00 of free online database search services until June 30, 1986 or until the grant runs out.

Any charges above the $36.00 limit will be paid by the graduate student.

NAME:_____

DEPARTMENT (MAJOR):_____DATE:_____

I intend to use the information from my search for:

_____Thesis research

_____Dissertation research

_____Class research paper/project

_____Other: please explain_____

_____

_____

I understand that I am responsible for any charges over the $36.00 allowed per search.

_____

Signature

Total Grant Expended_____ Form 10

DIALOG

Form 11.

E _____ MONTH _____ YEAR _____

CH	DATE	FILE #	CLIENT NAME	USER STATUS	DEPT	TOPIC/COMMENT	LOGON/ LOGOFF	# of ONLINE PRINTS	# of OFFLINE PRINTS	PRINT FORMAT	SRCH COST	+ / -

BRS

MONTH

YEAR

							Date
							Database Name
							Client
							Status
							Dept.
							Topic
							Logon/ Logoff
							Session #
							# of Online Prints
							# of Offline Prints & Charges
							Print Format
							Search Cost
							Query #
							+/-

Form 12

INDIANA STATE UNIVERSITY

CUNNINGHAM MEMORIAL LIBRARY

REQUEST FOR COMPUTER SEARCH

Please fill out completely and leave
at the Reference Desk, 1st Floor.

Note: A computer search involves charges of $8 for each government-sponsored database and $18 for commercial databases, plus print charges. The service is available 8:00am - 5:00pm, Monday - Friday.

1. Requestor's Name_____

2. Address_____

_____

3. Status (circle one): Faculty Graduate Student Undergraduate

Off campus User

4. Telephone Number:

On campus number	Office hours
_____	_____
Off campus number	Available hours
_____	_____

5. Search topic (simple statement, 1 sentence is sufficient):

_____

_____

6. Name of staff taking request_____

7. Date request taken_____

If you are not contacted by a searcher in
24 hours, please call 237-2580.

****

OFFICE USE ONLY

1. Search Referred to_____
Name of Librarian

2. Date search referred_____

3. Contact attempts_____

4. Search outcome (done or cancelled)_____

Form 13

DATABASE SEARCH EVALUATION
Reference Department
Indiana State University

In order to improve the ISU Library's Database Search Service, please complete the questionnaire and return it to the ISU LIBRARY, REFERENCE DEPARTMENT, DATABASE SEARCHES, if you have any questions regarding your search, please contact your search librarian.

SUBJECT AREA_____

Faculty_____Staff_____Grad. Student_____Under Grad. Student_____Other_____

1. How did you learn about the Database Search Service?
librarian_____colleague_____library announcement_____other_____

2. How many times have you used the service?_____

3. How many databases were searched?_____

4. Did you receive enough introductory information about the costs, preparation, probable results, etc. of the search?

Yes_____No_____Comments:_____

5. What percentage of the listings were relevant to your search?
_____0-20%_____21-40%_____41-60%_____61-80%_____81-100%

6. Were you satisfied with post-search assistance, (e.g., interpretations of the print out or locations of articles)?

Yes_____No_____Comments:_____

7. Did the results adequately meet your expectations?

Yes_____No_____Comments:_____

8. Do you feel the search librarian was sufficiently prepared to perform the search?

Yes_____No_____Comments:_____

9. Considering the time it would have taken you to manually search for your information do you feel the cost was reasonable?

Yes_____No_____Comments:_____

10. Would you use the service again or recommend it to others?

Yes_____No_____Comments:_____

11. How could the service be improved?_____

_____

12. Other comments: _____

_____

Indiana State University
Cunningham Memorial Library
Database Searching

Dear Sirs:

Please send us the following free item as listed in

Send it to the following address:

Pat Ensor
Database Searching
Cunningham Memorial Library
Indiana State University
Terre Haute, Indiana
47809

Thank you.

Sincerely,

Pat Ensor
Coordinator of
Database Searching

BRS & Dialog Search Statistics

Date_____ Total Searches_____

Searchers	No. of Searches for Patrons This Month/Year to date	User Status	
Ensor	_____/_____	Faculty	_____
Gaul	_____/_____	Graduate Students	_____
Huang	_____/_____	Undergraduates	_____
Keathley	_____/_____	Off-campus	_____
Norman	_____/_____		
Thompson	_____/_____		
Tribble	_____/_____		

Departments

_____

_____

_____

_____

_____

Actual Search Costs _____

Other Expenses Online _____

Total Online Costs _____ Charged to Patron _____

BRS Searches _____ Total Cost of BRS Searches _____

Dialog Searches _____ Total Cost of Dialog Searches _____

Average Cost Per BRS Search _____

Average Cost Per Dialog Search _____

Faculty Grant Searches _____ Grant Expended This Fiscal Year _____

Grant Expended _____ Grant Remaining _____

Graduate Grant Searches _____ Grant Expended This Fiscal Year _____

Grant Expended _____ Grant Remaining _____

Form 16